

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/14/2023

General Information

Name: Ms Cathleen O'Daniel Morgan

Address: 27140 Shell Ridge Cir, Bonita Spgs, FL 34134

PID 244049

County: Lee

AGENCY INFORMATION

Organization	Suborganization	Title
Lee County Public Schools	Elected Constitutional Officer	School Board Member District 7

Net Worth

My Net Worth as of December 31, 2022 was \$ 2,274,764.00.

Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effect is \$ 50,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence	\$ 400,000.00
Finemark Checking	\$ 47,674.00
Wells Fargo Trust A/C	\$ 1,262,676.00
IRA	\$ 514,414.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

Income

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income.

☐ I elect to file a copy of my 2022 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
Social Security	Form SSA 1099	\$ 32,054.00
Wells Fargo	1099 R	\$ 25,100.00
School District of Lee County	2855 Colonial Boulevard	\$ 45,275.26

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Business Entity	Major Sources of Business Income	Address	Principal Business Activity of Source
N/A			

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

- ☒ I certify that I have completed the required training under Section 112.3142, F.S.
- ☐ Required training under Section 112.3142, F.S., not applicable to filer for this form year.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Cathleen O'Daniel Morgan

Digitally signed: 05/14/2023

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